

**South Carolina Department of Health and Human Services  
PASS-ALONG WORKSHEET**

				<b>CASE DATA</b>	
<b>Name: First</b>		<b>Middle</b>		<b>Last</b>	
<b>Date:</b>		<input type="checkbox"/> <b>Application</b>		<input type="checkbox"/> <b>Review</b>	
				<input type="checkbox"/> <b>Re-budget</b>	
<b>Budget Group</b>				<b>Non-Financial</b>	
<b>Name</b>	<b>DOB</b>	<b>Relationship</b>	<b>Marital</b>	<b>Criteria Met</b>	<b>Social Security</b>
<b>1.</b>				<b>(Yes or No)</b>	<b>Number</b>
<b>2.</b>					
<b>3.</b>					
<b>4.</b>					

**NOTE: Before computing Pass-along budget sheet verify living arrangements to determine if Income Support and Maintenance (ISM) and/or deeming are applicable.**

**SEE REVERSE OF THIS SHEET TO CALCULATE CLIENT'S COUNTABLE RESOURCES.**

<b>BUDGET SUMMARY</b>	<b>NAME&gt;&gt;&gt;&gt;&gt;</b>			<b>TOTAL</b>
<b>1. Current SSA benefit amount</b>		\$	\$	\$
<b>2. Last SSA Benefit Amount Prior to SSI or OSS Ineligibility</b>				
<b>3. Subtotal (1-2=3)--This is the Dollar Amount of COLA Increases Since SSI Ineligibility</b>				
<b>Unearned Income</b>				
<b>4. SSA/RR Retirement Benefits</b>				
<b>5. Other (ISM, Deemed Income, etc.)</b>				
<b>6. Subtotal (4+5=6)</b>				
<b>7. Allocation for Ineligible Children</b>				
<b>8. Subtotal (6-7=8)</b>				
<b>9. SSI General Disregard</b>				
<b>10. Subtotal Unearned Income (8-9=10)</b>				
<b>Earned Income</b>				
<b>11. Wages/Salaries/Self-Employment Income</b>				
<b>12. Allocation for Ineligible Children</b>				
<b>13. Subtotal (11-12=13)</b>				
<b>14. SSI General Disregard Not Used in Item 9 Above</b>				
<b>15. Subtotal (13-14=15)</b>				
<b>16. SSI Earned Income Disregard (\$65.00)</b>				
<b>17. Subtotal (15-16=17)</b>				
<b>18. Additional SSI Earned Income Disregard (One-half (1/2) the Amount in Item 17)</b>				
<b>19. Subtotal Earned Income (17-18=19)</b>				
<b>20. Total Countable Monthly Income (10+19=20)</b>				
<b>21. Dollar Amount of COLAs From Item 3</b>				
<b>22. Income Amount to Compare to the Appropriate SSI FBR OR OSS NIL (20-21=22)</b>				

**If item 22 is greater than the appropriate SSI FBR or OSS NIL deny case.**

		<b>CASE DISPOSITION</b>	<input type="checkbox"/> <b>Approved</b>
		<input type="checkbox"/> <b>Continued Eligible</b>	<input type="checkbox"/> <b>Denied</b>
<b>Eligibility Worker's Signature</b>	<b>Decision Date</b>	<b>Date of Eligibility:</b>	<input type="checkbox"/> <b>Closed</b>

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<b>Burial Assets Exclusion Computation</b>	
<b>1. Determine Net Burial Assets Exclusion Limit:</b>	
\$	<b>1A. Maximum Burial Assets Exclusion Limit</b>
\$	<b>1B. Offset (Subtract value of irrevocable burial arrangements.)</b>
\$	<b>1C. Net Burial Assets Exclusion Limit (A-B)</b>
\$	<b>2A. Combined Value of Burial Assets</b> (Revocable burial contracts, revocable trusts or other designated assets, e.g., bank accounts, etc.)
\$	<b>2B. Net Burial Assets Exclusion Limit (1C)</b>
\$	<b>2C. Excluded Burial Assets (If 2A equals or exceeds 2B, enter 2B amount here. If 2A is less than 2B, enter 2A amount here.)</b>
Enter 2C amount on line 14 below.	
<b>Countable Resources Computation</b>	
	<b>Value</b>
<b>1. Automobile, Truck, etc.</b>	\$
<b>2. Life Insurance</b>	\$
<b>3. Cash on Hand</b>	\$
<b>4. Checking Account</b>	\$
<b>5. Saving(s) Account</b>	\$
<b>6. U.S. Savings Bonds</b>	\$
<b>7. Stocks and Bonds</b>	\$
<b>8. Trust Fund</b>	\$
<b>9. Pre-need Burial Contract (Revocable)</b>	\$
<b>10. Non-Excluded Cemetery Lot(s)</b>	\$
<b>11. Real Property</b>	\$
<b>12. Other</b>	\$
<b>13. Countable Resources Subtotal (1 through 12)</b>	\$
<b>14. Less Burial Exclusion</b>	\$
<b>15. Total Countable Resource Value (13- 14)</b>	\$
<b>16. Resource Limit (\$2000—Individual/\$3000--Couple)</b>	\$
<b>If item 15 amount exceeds item 16 amount deny the case.</b>	